



ENHANCING CUSTOMER EXPERIENCE

CREDIT UNIONS

Today's financial services customer is well-informed and won't hesitate to switch institutions if their expectations aren't met – or exceeded.

There is also no shortage of competing credit unions, commercial banks, and even online-only financial institutions for customers to choose from.

UNIVERGE BLUE ENGAGE Contact Center helps credit unions differentiate where it matters, by creating exceptional customer experience for its members, across the communications channels of their choice – phone, web, SMS, chat, and more. Seamless integration with all mainstream and even custom-built CRMs and financial applications ensure that the customers' journey will be optimal from end to end.



CREDIT UNION CHALLENGES

- › Massive amounts of data can create reporting overload
- › Minimize the frustration of complex issues with more context and a stronger human touch
- › Customer feedback is critical and must be gathered regularly but efficiently
- › Security and compliance regimes are among the world's strictest
- › Savvy customers want quick answers, selfservice, and automated assistance
- › Customer values can be extremely high and churn must be minimized
- › Continuous process improvement is a major initiative
- › Some existing industry IVRs may not be connected to each other or able to share data/authentication – clients may become frustrated with unnecessary repeated actions

CONTACT CENTER SOLUTIONS

- › Leverage pre-built libraries of common reports, build custom reports as needed, and easily schedule and save reports
- › Customer journey helps visualize client touchpoints, Preferred Agent Routing helps the client stay with the same agent, and CRM integration helps flag critical notes and next steps
- › Classify interactions to help visualize trends, automatically send callers to post-call surveys, conduct large-scale outreach with Dynamic Notifications
- › Contact Center meets or exceeds all PCI-DSS compliance standards
- › Leverage self-service channels with web chat, advanced IVRs (e.g. look up balance, take payments), and reporting automation
- › Prioritize inquiries based on value, deliver context when transferring calls, leverage Dynotes to seek feedback and communicate special offers
- › Qualify improvements by measuring KPIs, first-call and next-call resolutions, and upsell opportunities; get alerts based on KPIs; use the Evaluator suite to provide consistent, structured feedback to agents based on their interactions
- › Unify all IVRs under the Contact Center suite, allowing for easy data, context, and authentication sharing

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